Oversight Projects at a Glance: Key

Introduction

Several ISB members have expressed the desire to have high-level, summary project information presented in a visual format – a dashboard. The chart on the following page is a slight variation of one provided to us by Earl Heister and his staff at the Pacific Northwest National Laboratories.

The chart attempts to show, using a green / yellow / red metaphor, the status of the scope, schedule, and overall health of any project as well as the change or trend from the previous reporting period. It also shows the ISB approved budget, the current project budget, and the project-to-date actuals.

ISB staff is presenting this chart for the first time; and we realize there will be questions concerning the meaning of its contents. This "Key" attempts to explain the chart.

Projects

The chart lists all ISB oversight projects (Level 3s) and selected staff oversight projects (Level 2s). Level 2 projects that are not reported to the Board, but are under staff oversight, are not included.

Scope

Need

- Critical: the project must be undertaken; may be federally or state-mandated; the agency has no option or alternative (examples: Y2K, DOP's HRMS supporting the Personnel System Reform Act of 2002; hardware or software no longer supported by vendor)
- High: the project has a significant impact on the business of the state, the agency, or the stakeholders (examples: DSHS' welfare eligibility and payments, WSP or EMD's emergency radio systems upgrades, State Investment Board or Treasurer's investment portfolio management systems)
- Medium: the ISB typically does not see projects in this category; they may represent an opportunity for the agency to improve services or operations; typically not mission-critical.
- Low: the ISB typically does not see projects in this category; these are typically tests of new technology, a proof-of-concepts, or "research and development" project.

Slip

Indicates whether project requirements (scope) are increasing or decreasing, either may warrant further investigation. Slip is sometimes known as scope creep.

Increasing scope slip may indicate that the project did not perform adequate design or planning; requirements may have been missed. Decreasing scope slip may indicate that the project is removing or delaying functions in order to meet schedule or budget.

A plus sign (**+**) in the shaded cells indicates an increase from last report; a minus sign (**-**) indicates a decrease from last report; an equal sign (**=**) indicates no change; and an **X** indicates that the phase has been completed.

A green cell indicates little or no slip; a yellow cell indicates moderate slippage; and red cell indicates significant slippage. A gray cell indicates that the slip is undefined or it not applicable.

Schedule

(P) - Planning
May include refinement of feasibility study, creation of project controls (e.g., charter or governance, initial project plan, general high-level design work, staffing plan, change management plan, etc.)

(Ds) - Design
This refers to detail design work. Examples include creating database design, process workflow, screen layouts, etc.

(Dv) - Development
Includes application development, file conversion, creation of various plans (testing, training, acceptance, implementation).

(T) – Testing
Includes system testing, integration testing, and user acceptance.

(I) - Implementation
Includes training, rollout and installation, decommissioning of legacy application.

Budget

Original
This amount is the implementation cost for the project; i.e., the amount needed to make the project operational. It typically does not include lifecycle costs such as ongoing maintenance.

Current
This amount reflects any changes to the Original Budget.

Proj TD (Project-To-Date)
This is the amount of funds expended thus far.

Project Category Health (Variance from Plan)

Scope, Schedule, Budget, Other
This is a summary of the overall project. A schedule may be yellow in a specific phase, but the overall schedule may be green. Likewise with scope and budget. There may be "Other" items that also affect the project. Examples could include: executive commitment, stakeholder readiness/commitment, quality of project management processes, etc.

Again, a green cell indicates little or no overall variance; a yellow cell indicates moderate overall variance; and red cell indicates significant overall variance. A gray cell indicates that the variance is undefined or is not applicable.

Finally, the shaded cells may be categorized as “Least” or “Most”.

- Least: this component has the least capacity or flexibility for change
- Most: this component has the most capacity or flexibility for change

If a specific phase in the “Schedule” component is red and the category is listed as “Most” in the health section, that might indicate that although the project is off schedule, it either has sufficient contingency or no time constraints.

Conversely, if the component is red and the category is listed as “Least” in the health section, that might indicate a serious problem in the project. In other words, the project could be late, there is no contingency, and there is a firm deadline.